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The Oil Pipeline Behind Erdogăn's Anti-Israel Rhetoric

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BAKU, AZERBAIJAN - OCTOBER 26: (FILE PHOTO) Ageing infrastructure, leaking crude oil and debris from decades of extraction, litter an oil field, October 26, 2006 in Baku, Azerbaijan. Oil-rich Azerba...More

At COP28 in Dubai, I watched Turkish President Recep Tayyip Erdogăn condemn Israel's military campaign in Gaza as "a war crime and a crime against humanity," calling for prosecutions and urging Muslim nations to isolate Israel.

Meanwhile, oil from Azerbaijan was flowing through a pipeline that terminates at a Turkish port, loading onto tankers, and sailing directly to Israeli refineries.

Investigators have documented that this oil is refined into fuel for the very F-35 fighter jets conducting the strikes Erdogăn was condemning. Turkey was collecting a toll on every barrel.

That is the story. Not the rhetoric—the pipeline. It's hard to explain how the Turkish president can reconcile his thinking. Indeed, energy, arms deals, and domestic politics are colliding inside one of NATO's most difficult members.

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"Erdogăn can't run on a strong economic record. Turkish citizens despise his governance," Sinan Ciddi, senior fellow at the Foundation for Defense of Democracies, told me in an interview. "He deflects from this by finding an external enemy, although it is hard to measure how much his people buy into this distraction. All he does is spew vitriol—not close out his air space, stop sending oil, or halt any remaining trade."

Turkish exports to Israel totaled nearly $400 million in the first five months of 2025, while Turkey remained one of Israel's largest suppliers—ranking fifth in 2024—despite an official embargo.

More significantly, Azerbaijan has supplied roughly 40% of Israel's annual crude oil consumption for nearly two decades via the Baku–Tbilisi–Ceyhan pipeline, which runs from the Caspian Sea through Georgia to a Turkish Mediterranean port, where the oil is shipped to Israel. In January 2024, Israel was Azerbaijan's single-largest oil customer, importing 523,500 tons worth $297 million that month alone.

By September 2024—well after Erdogăn had declared a trade embargo on Israel — Azerbaijani exports to Israel had ballooned to 2.37 million tons that month alone, a fourfold increase since the start of the Gaza war. Turkey's cut: confirmed at $1.27 per barrel by a member of Erdogăn's own ruling party.

The Embargo That Wasn't

Sinan Ciddi is a senior fellow at FDD and director of the Turkey program.

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When Erdogăn announced his trade embargo in May 2024, researchers from multiple organizations tracked tanker movements and found the shipments continuing. One tanker made ten documented trips between the Turkish terminal and the Israeli port—eight of them after the embargo was declared.

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The ships turned off their tracking signals in the Eastern Mediterranean and falsified manifests, listing Egypt as their destination but docking in Israel. Turkey's energy ministry insisted it had no control over where the oil went, citing the 1999 host government agreement that legally obligates Turkey to keep the pipeline running regardless of regional conflict.

That's the legal alibi. The strategic reality is more revealing.

Israel is one of Azerbaijan's primary arms suppliers. That includes combat drones, long-range artillery, and a $1.2 billion surface-to-air missile system. Israeli-built drones were decisive in Azerbaijan's 2020 victory over Armenia. Furthermore, Azerbaijan's state oil company recently secured a gas exploration license in the Mediterranean waters off Israel. The two countries' relationship has been described as "the most stable" Israel has with any Muslim country.

Azerbaijan is also Turkey's closest ethnic and political ally. Erdoğăn cannot squeeze Azerbaijan without fracturing that relationship and disrupting a military-industrial partnership on which Baku depends. Cutting the pipeline would devastate Turkey's most important ally, not Israel's military might.

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The triangle looks like this: Azerbaijani oil flows to Israel through Turkey. Israeli weapons flow back to Azerbaijan. Turkey collects a transit fee, and Erdoğăn condemns the whole arrangement in speeches.

Dr. Ciddi, with Defense of Democracies, has been blunt about what is actually happening, notably that Turkey is suffering from extremely high inflation, unemployment, and poverty. "Azerbaijan has tried to mediate between Israel and Turkey. It can't get Erdoğăn to tone down his rhetoric. Everyone looks the other way and continues. Erdoğăn hates Israel. Now he is trying to convince his citizens that Israel has its guns and sights on Turkey after Iran. He lives comfortably in a world of contradictions because he, along with everyone in his patronage network, profits from the relationship."

A President Under Pressure

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Erdogăn is cornered, as made explicit in March 2025. His government arrested Istanbul Mayor Ekrem İmamoglŭ—his most formidable political rival—just days

before İmamoglŭ was to be formally nominated as the opposition's presidential candidate. The largest street protests Turkey had seen in over a decade erupted. Erdogăn's response: escalate his anti-Israel rhetoric

"It's a perfect example of Erdogăn's desperation," Ciddi explains.

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The hypocrisy cuts in multiple directions. While condemning Israeli military operations, Erdogăn has conducted sustained cross-border military campaigns against Kurdish forces in Iraq and Syria, displacing tens of thousands of civilians.

Turkish airstrikes killed 12 on one day in October 2024. Their adversary? U.S.-backed Syrian Democratic Forces, which are Kurdish-led and the primary partner against ISIS. The logic Erdogăn uses—counterterrorism and national security—mirrors Israel's stated rationale in Gaza. Only the target and the audience differ.

Some analysts argue that Erdogăn tries to navigate an impossible set of constraints. Writing in The Conversation, Burak Kadercan, professor of strategy at the Naval War College, describes Erdogăn's approach as an attempt "to strike a balance between domestic politics and realpolitik on the international stage."

Turkey, however, is a member of NATO, and a mediator does not call the other party's leader "the Butcher of Gaza" and demand his trial at The Hague. And a real negotiator does not imprison his country's most popular democratic politician on the same week he is denouncing authoritarian violence abroad.

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Even Turkey's own deputy ambassador reportedly admitted to Israeli officials that Erdogăn's harsh rhetoric "stems from Erdogăn's political considerations."

The Baku–Tbilisi–Ceyhan pipeline may be infrastructure. But it reflects poorly on a head of state who has built a brand on moral outrage while collecting transit fees on the very cargo he condemns. Erdogăn's political survival depends on his

voters overlooking the stark contradictions between his rhetoric and his actions.

Turkish officials have recently escalated their language over Israel's strikes on Hezbollah in Lebanon, hinting at military confrontation. This language may resonate in some circles, though it is deeply problematic for U.S. allies. But as with Erdogăn's Gaza rhetoric, the threats outpace reality: the oil still flows, the trade persists, and the underlying relationships remain intact.

"Erdogăn has a duplicitous relationship with NATO—the same as he does with Israel," says Professor Ciddi. "Turkey enables the Russian war machine. Erdogăn likes having his feet in both camps, which is an issue for the allies. It is all deeply hypocritical and contradictory, but he needs the trade and profits."

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The speeches cost nothing. The pipeline pays. That's not a contradiction—it's the strategy. And it is a high-stakes gamble that Erdogăn may ultimately lose.

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